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ABSTRACT

This is the first of four student packets forming part of a position simulation for use in an office applications laboratory at the postsecondary level. The purpose of the simulation is to give the student an opportunity to learn the tasks and duties performed by a legal secretary. The packet, which begins with a simulated office schedule for one 8-hour day, includes 5 numbered jobs and supplies (any necessary letterhead or special forms). Instructions are provided immediately before each job. Jobs include typing and filing individual cards for clients, typing a request for a hearing and rough letter, typing a last will and testament from a handwritten draft, typing financial statements in acceptable form, and typing a deposition from dictation. (YLB)

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OFFICE OCCUPATIONS

ED249405

Mae Conn and Associates

A Legal Secretary Position Simulation

Student Packet 1

U.S. DEPARTMENT OF EDUCATION
NATIONAL INSTITUTE OF EDUCATION
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Georgia Department of Education

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Developed and Produced
Under Contractual Agreement with

Division of Program Development
Office of Vocational Education
Georgia Department of Education
Atlanta, Georgia 30334
Charles McDaniel, State Superintendent of Schools
1982

UPD 7729/7-82

MAE CONN AND ASSOCIATES

A Legal Secretary Position Simulation

Developed by

Macon Area Vocational-Technical School
Macon, Georgia

Revised by

Georgia State University
Atlanta, Georgia

Project Supported by

Office of Vocational Education
Georgia Department of Education
Division of Program Development
Atlanta, Georgia 30334

Dr. Charles McDaniel, State Superintendent of Schools

1982

FOREWORD

This legal secretary position simulation was designed to be used in an office applications laboratory at the postsecondary level. Its purpose is to give the student an opportunity to perform those tasks and duties that may be performed by a legal secretary.

Appreciation is expressed to Mr. K. Gerald Allen, Project Coordinator, and to the business education instructors at Macon Area Vocational-Technical School for the development of these materials.

Appreciation is also expressed to the many business education instructors throughout the state who field tested and provided invaluable feedback on the materials as a part of this revision effort.

Sincere thanks go to Dr. John H. Lloyd, Director, Program Development Division, Georgia Department of Education, for his continued encouragement, support, and leadership in this revision effort.

Dr. Harmon Fowler
Project Director
Office Simulation Project

Mrs. Doris Rash-Wooten
Assistant Project Director
Office Simulation Project

MONDAY

OFFICE SCHEDULE FOR TODAY			
		FOR	DESCRIPTION OF SERVICES
8	00		TYPE & FILE INDIVIDUAL FILE CARDS
	15		
	30		
	45		
9	00	Samuel J. KINTS	Type Request For Hearing & Letter
	15		
	30		
	45		
10	00		
	15		
	30		
	45		
11	00	Wendy Gale Persimon	Last Will & Testament
	15		
	30		
	45		
12	00		
	15		
	30		
	45		
1	00		
	15		Type Financial Statements (Income,
	30		Capital Statements, Balance Sheet)
	45		
2	00		
	15		
	30		
	45		
3	00		
	15		
	30		
	45		
4	00	Martha G. Lincoln	Transcribe Dictation for Deposition
	15		
	30		
	45		
5	00		
	15		
	30		
	45		
NIGHT HOURS			

FROM THE DESK OF MAE CONN

Type a card for each of the clients listed on the attached sheets (use 3x5 index cards). Be sure that name, address, phone number, and client file number are entered correctly. The file number should be typed in the upper right corner of the card.

File cards alphabetically in card file and keep updated hereafter.

MC

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Clientele - Mae Conn and Associates

File Number

Cain, J. Paul (Mr.) 25501
4292 Vista Circle
Macon, GA 31204
788-0983

Dukes, Janice W. (Ms.) 25502
315 Westover Drive
Milledgeville, GA 61831
942-6606

Fletcher, Louis C. (Mr.) 25503
Publisher, Direction Magazine
29 Chandler Drive
Warner Robins, GA 31093
982-8117

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General Builders, Inc. 25504
372 Fifth Street
Gray, GA 31773
444-3172

Harden, Johnny P. (Mr.) 25505
345 Forest Lane
Macon, GA 31416
745-0551

Ideal Homes, Inc. 25506
3393 Vineville Ave.
Macon, GA 31204
745-5915

Jacobs, Doris (Mrs.) 25507
Route 3, Box 415
Macon, GA 31216
745-0663

Jones, Howard (Mr. & Mrs.) 25508
1417 Pio Nono Ave.
Macon, GA 31215
743- 6093

Kearce, Kenneth W. (Mr.) 25509
1993 Centerville Rd.
Byron, GA 41703
433- 3173

Kints, Samuel J. (Mr.) 25510
3390 Napier Ave.
Macon, GA 31204
745- 8610
S.S. # 286- 75- 9036

L. L. L. Suppliers, Inc. 25511
748 Prudential Bldg.
Macon, GA 60601
745- 7663

Lincoln, Martha D. (Mrs.) 25512
3175 Guthrie Drive
Perry, GA 31706
547- 6837

MacAdams, Rose L. (Miss) 25513
1900 South Maple Street
Payne City, GA 61920
746- 6309

MacCollum, Alex J. (Mr.) 25514
1300 Silver Avenue
Kathleen, GA 76132
795- 4715

Martin, Mercer, & Mounds 25515
83 Florence Ave.
Macon, GA 33605
743- 0967

Midas Mortgage Co. 25516
494 Dubuque Street
Gray, GA 52001
444- 8414

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Miss May's Gift Shop 25517
3720 Cypress Street
Forsyth, GA 60177
982-2881

Moye, D. (Mr. & Mrs.) 25518
367 Riverview Road
Macon, GA 31217
743-8017

Myers, R. L., Jr. (Mr.) 25519
4732 Riverview
Milledgeville, GA 61832
457-7184

National Car Rental System 25520
480 ~~Second~~ Second Ave.
Macon, GA 06516
742-4167

Neilson, George D. (Mr.) 25521
2100 Jackson St.
Gray, GA 66044
444-1441

Neon Signs 25522
3467 Mountain View Road
Atlanta, GA 31578
983-1723

Nichols Construction Co. 25523
1740 Abbott Drive
Macon, GA 65806
788-1883

Oake, J. B. (Sarah) (Mrs.) 25524
3439 Lincoln Way
Barnesville, GA 68522
982-2223

O'Brien, Marvin O. (Marian) (Mrs.) 25525
345 East First Street
Perry, GA 77034
547-7447

Offner, B. W. (Dr.) 25526
901 Parker Bldg.
Macon, GA 58501
745-5447

Persimon, Wendy Gale (Mrs.) 25527
935 Clairmont Ave.
Macon, GA 31208
745-2521

Ridley, R. J. (Mr.) 25528
360 Forest Lake Drive
Lizella, GA 31378
942-6887

Saint Albans, Michael M. Inc. 25529
2100 Danville Rd.
Danville, GA 40069
972-2716

San Benito, Tracey (Miss) 25530
2600 Lakeside Ave.
Milledgeville, GA 94132
457-6783

Schmidt, Samuel R. (Mr.) 25531
414 Main St.
Macon, GA 57783
743-6997

Scriven, Thomas R. (Mr.) 25532
Manager, The Sweet Shop
213 Front St.
Warner Robins, GA 57102
983-3883

Searles, V. T. (Dr.) 25533
3517 Linda Way
Haddock, GA 57102
983-8319

Seymore, Sally Jane (Ms.) 25534
5149 Macon Ave.
Macon, GA 31204
743-9871

Shurling, Julia P. (Ms.) 25535
983 Gray Highway
Macon, GA 31202
742-4614

Sibley Paint Shop 25536
234 Bailey Road
Macon, GA 51249
743-0873

Smith, Bessie Lou (Ms.) 25537
2331 West End Ave.
Fort Valley, GA 36093
447-7317

Spalding, Ralph J. (Mrs.) 25538
460 Riverview Drive
Macon, GA 31208
742-1313

Staples, Jo Ann (Mrs.) 25539
365 Area Lane Drive
Macon, GA 31208
743-6807

Suan, Won (Mr.) 25540
404 Abbey St.
Warner Robins, GA 63877
792-1972

Teague, Mack (Sara)(Mrs.) 25541
Box 174
Macon, GA 78206
781-0663

Ten High, Jark (Alicia)(Mrs.) 25542
Box 216
Elberta, GA 38705
982-2714

De Voss, Henry J. (& Sons 25543
88 Portland Road
Fort Valley, GA 62708
412-2614

Thompson, Jarvis E. (Mr.) 25544
14 Kimberly Lane
Centerville, GA 57102
983-0331

Joon, Soo un Vee (Mr.) 25545
P.O. Box 2300
Warner Robins, GA 77479
792-2416

Trucks-For-Hire, Inc. 25546
444 Spring St.
Macon, GA 31201
745-5337

Underwood, Sheldon P. (Mr.) 25547
4940 East First St.
Warner Robins, GA 57069
792-2147

Uptown Sisters 25548
(Teresa & Valencia Stone)
Suite 202
Parks Bldg.
Macon, GA 31202
788-1881

Joon, Soo un Vee (Mr.) 25545
P.O. Box 2300
Warner Robins, GA 77479
792-2416

Trucks-For-Hire, Inc. 25546
444 Spring St.
Macon, GA 31201
745-5337

Underwood, Sheldon P. (Mr.) 25547
4940 East First St.
Warner Robins, GA 57069
792-2147

Uptown Sisters 25548
(Teresa & Valencia Stone)
Suite 202
Parks Bldg.
Macon, GA 31202
788-1881

VanSickle, Vance & Voorhis 25549
Shull Bldg.
Macon, GA 31091
743-0991

Vinton, Sanford L. (Priscilla)(Mrs.) 25550
458 Grant St.
Bon Aire, GA 94108
983-0993

Walker, Johnny P. (Mr.) 25551
4495 Greenbriar Rd.
Barnesville, GA 37601
973-4603

West, Larry K. (Mr.) 25552
2191 Burton Ave.
Macon, GA 31204
743-6937

White, Ann S. (Mrs.) 25553
3173 Forest Hill Rd.
Macon, GA 31215
743-7673

White, Thomas W. (Mrs.) 25554
3173 Forest Hill Rd.
Macon, GA 31215
743-7673

Wilson, Harry L. (Dr.) 25555
1272 Medical Arts Bldg.
South Cherry St.
Macon, GA 31208
743-3612

Woodberg, Spring, & Riley Contractors 25556
207 Greene Bldg.
Macon, GA 31206
781-3714

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FROM THE DESK OF MAE CONN

Fill out the Request for a Hearing form using the following information.

Claimant - Samuel J. Kints
Social Security No - 286-75-9036
"Check" Initial Entitlement
"Check" Disability Worker or Child

I disagree with the determination... The previous decisions are in error. I am disabled as defined by the law and regulations.

INFORMAL REMAND WAIVED

"Check" I have additional evidence...
"Check" I wish to appear in person

Type in attorney's name, address, city, and telephone number. (also date).

Type in claimant's signature, address, city, and telephone number.

FROM THE DESK OF MAE CONN

Please type this letter to the Social Security Administration, P.O. Box 4128, Macon, GA 31208. Also, type the form for a request for a hearing.

RE: Samuel J. Kintz
Social Security No. 286-75-9036

Ladies and Gentlemen:

Enclosed you will find a Request for a Hearing that we are filing on behalf of the above individual. The request for reconsideration was denied on May 2, 19--.

If anything additional is needed from us to file this Request for a Hearing, please feel free to call on us.

VTY

Send a carbon copy to the plaintiff

REQUEST FOR HEARING

CLAIMANT

WAGE EARNER (Leave blank if same as above)

SOCIAL SECURITY NUMBER

SPOUSE'S NAME AND SOCIAL SECURITY NUMBER
(Completed ONLY in Supplemental Security Income Case)

(Check One)
Initial Entitlement ___ Termination or other Post-Entitlement Action ___

Type Claim (Check ONE)

Retirement or Survivors----------Only ___ (RSI)
Disability, Worker or Child-- -----Only ___ (DIWC)
Disability, Widow or Widower-------Only ___ (DIWW)

SSI, Aged-------- Only ___ (SSIA) With Title II Claim ___ (SSAC)
SSI, Blind-------Only ___ (SSIB) With Title II Claim ___ (SSBC)
SSI, Disability---Only ___ (SSID) With Title II Claim ___ (SSDC)
Other (Specify) ___

I disagree with the determination made on the above-listed and request a hearing. My reasons for disagreement are:

Check one of the following:

___ I have additional evidence to submit.

___ I have no additional evidence to submit.

Check ONLY ONE of the statements below:

___ I wish to appear in person.

___ I do not wish to appear in a hearing. I request that a decision be made on the basis of the evidence in my case.

Signed by: (Either the claimant or representative should sign. Enter addresses for both.

SIGNATURE OF NAME OF CLAIMANT'S REPRESENTATIVE

___ ATTORNEY ___ NON ATTORNEY

CLAIMANT'S SIGNATURE

ADDRESS

CITY, STATE, AND ZIP CODE

ADDRESS

CITY, STATE, AND ZIP CODE

TELEPHONE NUMBER

DATE:

(Claimant should not fill in below this line)

TELEPHONE NUMBER

TO BE COMPLETED BY SOCIAL SECURITY ADMINISTRATION

Is this request timely filed? ___ YES ___ NO

If "NO" is checked: (1) Attach claimant's explanation for delay, (2) Attach any pertinent letter, material, or information in the Social Security Office.

Interpreter Needed ___ (Language)

ACKNOWLEDGMENT OF REQUEST FOR HEARING

This request for hearing was filed on ___ at ___

The Administrative Law Judge will notify you of the time and place of the hearing at least 10 days in advance of the hearing.

HEARING OFFICE COPY

TO:

___ Hearing Office ___ (Location)

___ ___ (Location) Claims Involving SSI or Combined SSI-RSDI)

___ Supplemental Security Income File Attached

CLAIM FILE COPY

TO:

___ HEARING OFFICE

___ CLAIM File(s) Requested by Teletype to ___ (Location)

___ ACB (BOP)

For the Social Security Administration:

By: ___ (Signature)

___ (Title)

___ (Street Address)

___ (City, State, and Zip Code)

___ Servicing Social Security Office Code ___

___

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MAE CONN & ASSOCIATES

Attorneys at Law 3300 Macon Tech Dr.

Macon, Ga. 31206 Telephone 781-0551

STATE OF GEORGIA

COUNTY OF BIBB

Please have this will typed by 3 o'clock. Wendy will be in to sign it at that time.

LAST WILL AND TESTAMENT
OF
WENDY GALE PERSIMON

I, Wendy Gale Persimon, of said State & County, do make and publish this my Last Will and Testament, hereby revoking all wills heretofore made by me.

ITEM I.

(a) I wish my body buried in a suitable manner and a suitable memorial erected and the cost thereof paid out of my estate.

(b) All of my just debts shall be paid out of my estate as soon as practicable.

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ITEM II.

All of the rest, residue and remainder of my property of every description, and wheresoever located, I give, devise and bequeath to Brett Ray Persinon, my husband, in fee simple if he is alive at the time of my death; if not, then this bequest shall go in fee simple to my child, Sunree Lynn Persinon.

ITEM III.

All of the bonds, bank accounts, savings accounts and building loan accounts I may own at the time of my death which designate myself and/or any other person as the owner thereof shall be the sole property of such other person and my Executor shall make no claim against them on account thereof. All such property is intended to be in joint ownership with such other person having the right of survivorship, and in the event such person does not otherwise have such right, the property pursuant to this provision is hereby given and bequeathed to such person.

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ITEM IV.

I hereby constitute and appoint as Executor of this Will John C. Jones. However, in the event he should predecease me or fail or cease to act as Executor, then I hereby appoint my husband, Brett Ray Persinon, to act as Successor Executor.

ITEM V.

(a) In the management, care, & disposition of my estate, I confer upon the Executor the right to sell, exchange or otherwise dispose of any property at any time held or acquired under this Will at public or private sale, for cash or on terms, without advertisement, and also to invest all monies in such stock, bonds, securities, mortgages, choses in action, real estate, improvements thereon, and such other property as the Executor shall deem best without regard to any law now or hereafter in force limiting investments of fiduciaries.

(b) In the distribution of my estate the Executor shall have the authority to make the division in money or in kind, or in both, and the division made and the values

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ITEM IV.

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(b) In the distribution of my estate the Executor shall have the authority to make the division in money or in kind, or in both, and the division made and the values

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established by the Executor shall be binding and conclusive on all persons taking hereunder.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my seal to this my Will, this 3RD day of May, 1979.

_____ (SEAL)

Signed, sealed, published, and declared as and for her Last Will and Testament in our presence and we, at her request and in her presence, and in the presence of each other, have hereunto subscribed our names as witnesses the day and year above set out.

WITNESSES: ADDRESSES:

_____, Macon, Georgia

_____, Macon, Georgia

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FROM THE DESK OF MAE CONN

Please type the attached Financial Statements in an acceptable form.

MC

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MAE CONN
Income Statement
For Quarter ended September 30, 19--

Revenue		
Legal fees		$51,285.63
Expenses		
Rent Expense	1,500.00	
Utilities Expense	1,277.50	
Salaries Expense	26,500.00	
Supplies Expense	150.95	
Insurance Expense	120.15	
Delivery Expense	31.75	
Misc. Expense	47.28	
Travel Expense	1,000.00	
Entertainment Expense	500.00	
Total Expenses		31,127.63
Net Income		20,158.00

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MAE CONN
Balance Sheet
September 30, 19--

ASSETS

Cash	$240,000.00	
Petty cash	200.00	
Accounts receivable	32,300.00	
Supplies	535.00	
Office equipment	12,500.00	
Office Furniture	13,750.00	
Total Assets		$299,485.00

LIABILITIES

Bartlett & Reid, Savings & Loan Assn.	$20,062.00	
Rogers Office Supply Co.	415.00	
Thomas Furniture Store	12,600.00	
Williams & Swinney Office Equip. Co.	7,000.00	
Total Liabilities		$40,077.00

CAPITAL

Mae Conn		259,408.00
Total Liabilities and Capital		$299,485.00

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MAE CONN
Capital Statement
for Quarter Ended September 30, 19--

Mae Conn, Capital, July 1, 19--		$250,000.00
Net Income for Quarter Ended September 30, 19--	$20,158.00	
Less Withdrawals for Quarter Ended September 30, 19--	10,750.00	
Net Increase in Capital		9,408.00
Mae Conn, Capital, September 30, 19--		$259,408.00

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FROM THE DESK OF MAE CONN

RE: Martha G. Lincoln (plaintiff)
vs. George A. Lincoln (defendant)

I took this deposition downtown late yesterday. Please type the document from the dictation provided. The dictation for the deposition is totally complete. Use your Employee Guide as a reference to style.

This case is coming up in a couple of days, so I'll need it as soon as possible.

Thanks,
MC

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